

NOMINATION DETAILS / INSTRUCTIONS

As per SEBI regulations, you can assign one or more nominee(s) to the investment, to whom the amounts will be payable on death of the sole or all Unitholders as the case may be. This form is to be filled if you wish to nominate multiple nominees. If you are filling this at the time of opening a new folio with Quantum Mutual Fund, please submit this along with the Common Application Form. You may also use this for nominating multiple nominees subsequent to opening a folio, or to modify existing nomination(s)

- a) The nomination can be made only by individuals applying for / holding units on their own behalf singly or jointly. Non-individuals including society, trust, body corporate, partnership firm, Karta of HUF cannot nominate.
- b) A Unitholder can have a maximum of 3 nominees.
- c) A minor can be nominated and in that event, the name, address and signature of the guardian of such minor nominee shall be provided. Nomination may also be in favour of the Central Government, State Government, local authority, any person designated by virtue of his office or a religious or charitable trust.
- d) The Nominee shall not be a trust (other than a religious or charitable trust), society, body corporate, partnership firm, Karta of HUF or a PoA holder. A non-resident Indian can be a Nominee, subject to the exchange control regulations in force, which may change from time to time.
- e) Nomination in respect of the units stands rescinded upon the transfer/transmission of units. Transmission of units in favour of a Nominee shall be valid discharge by the AMC against the legal heir.
- f) A Non-Resident Indian can be a nominee subject to the exchange control regulations in force, from time to time.
- g) The cancellation of nomination can be made only by Unitholders on their own behalf, singly or jointly, and who have made the original nomination. On cancellation of the nomination, the nomination shall stand rescinded and the AMC shall be under no obligation to transfer the units in the Nominee's favour.
- h) If the unitholders have not indicated the percentage of allocation for each nominee, the AMC shall settle the claim proportionately amongst the nominees on equal basis. However in case of 3 Nominee(s), the allocation by default will be 34%, 33% & 33% respectively for each Nominee in the sequential order if the investor/s has/have failed to furnish the ratios.
- i) PoA Holders cannot execute a nomination request, it has to be executed by the Applicant(s)/Unitholder(s).
- j) Submission of fresh Nomination form if found in order will tantamount to cancellation of existing Nomination.
- k) Nominee is registered/modified/changed only at folio level and not at Scheme/Option/Facility level.